

BERKELEY UNIFIED SCHOOL DISTRICT

TO: Donald Evans, Ed.D., Superintendent
FROM: Natasha Beery, Director of BSEP and Community Relations
DATE: April 6, 2016
SUBJECT: BSEP Measure Planning Update

BACKGROUND INFORMATION

The local tax known as the Berkeley Schools Excellence Program (BSEP) has contributed significantly to the quality of Berkeley public schools and to the fiscal stability of the school district since 1986. Thanks to BSEP, our schools have smaller class sizes, libraries, music programs, instructional technology, before and after-school programs, professional development for teachers, and other essentials for student success that are not possible with state funding alone.

The current version of the measure, the Berkeley Public Schools Educational Excellence Act of 2006 (Measure A), expires at the end of Fiscal Year 2016-17, with a renewal to go before the voters on November 8, 2016. The Board will review a draft of the new measure on April 13, with further discussion in May and a decision by June 2016 in order to go on the November ballot.

This update to the board is the final planning report prior to the preliminary draft to be presented on April 20, 2016. Prior planning reports were presented to the Board on March 12, 2014, November 14, 2014, January 28, 2015, June 3, 2015, September 30, 2015, and November 18, 2015.

BSEP Planning Status Report

This report summarizes progress made since the last board report on November 18 in the three major components of the planning process:

- Educational Priorities: an examination of the components of the current measure and review of key issues related to each area;
- Budget Models: an analysis of financial scenarios;
- Public Process: the methods of community input for decision-making

Educational Priorities

The Assistant Superintendent for Educational Services, Pasquale Scuderi, presented to the Board a series of three reports summarizing the development and current status of current BSEP-funded programs, outlining challenges and opportunities in each program area. These reports have been published on the [BSEP Measure Planning “Forums and Presentations” webpage](#).

- 1) *The Essentials for Excellence*: class size reduction, music and performing arts, expanded course offerings and site discretionary funds, libraries and technology – presented September 30, 2015;
- 2) *Support for Students and Families*: including parent outreach, counseling, public information, communication, translation, and community engagement -presented October 14, 2015;
- 3) *Support for Teaching and Learning*: including professional development and program evaluation, and program support – November 18, 2015.

Budget Models

The Superintendent has convened a Budget Models Workgroup that has met regularly since early 2015 to review fiscal issues related to BSEP resources. The BSEP Planning and Oversight Committee has also reviewed the programs and budgetary components.

Revenue and Expenditures for Models

Previous updates to the Board have outlined the fiscal issues that affect BSEP revenues, including state funding forecasts, current rulings on allowable tax rates for residential and commercial properties, and annual cost-of-living increases. Major components of BSEP expenditure forecasts include enrollment projections, compensation and benefit costs, program elements, and staffing models.

Class Size Reduction (CSR) Resource

The largest element of the current measure, the Class Size Reduction (CSR) component, accounts for 66% of current revenue allocations. The Measure A CSR resource is structured so that after specified class size targets are reached, remaining funds may be expended for middle school counseling, expanded course offerings at the secondary schools, and academic program support. In recent years, the costs of the primary purpose of class size reduction have absorbed nearly the entire BSEP CSR resource, leading to a reduction in other programs and/or a shifting of costs back to the General Fund. In planning for the next measure, the Budget Models Workgroup has examined several alternative models for a sustainable CSR resource, including variations on elementary class sizes and options for reconfiguring structural elements of the measure.

Changing CSR Targets

Prior to 1996, the BSEP measure reduced class sizes to 26:1 in K-5th grades. After the state introduced a Class Size Reduction target of 20:1 for K-3rd grades and provided a significant financial reward for achieving that goal, BUSD was able to qualify for the state CSR fund, thanks to BSEP financial support.

However, in 2012, the state funding for CSR was reduced, and the state target K-3 class size was adjusted to 24:1 as a school-wide average.

Difficulties with 20 and 26 in Elementary Schools

Meanwhile, as most BUSD elementary schools are small, many schools encounter logistical issues in the transition from third to fourth grade class sizes. For example, when there are three third grades of 20 (with a total of around 60 students), it is not possible to achieve fourth grades of 26 unless there are “combo” classes (3rd/4th or 4th/5th), or a site chooses to waive the goal of 26, leading to class sizes of 30 or more in the upper elementary grades.

Furthermore, maintaining very small class sizes in the context of our small elementary schools has also lead to devoting most of the available “flex room” space to classroom use, an issue which was highlighted as a possible constraint on the 20:1 ratio when the 2006 measure was being planned.

Class Size Options

The fiscal, facilities, and logistical issues around elementary class sizes have lead to a reexamination of the optimal class size configuration for BUSD schools. The Budget Models Workgroup and Superintendent’s Cabinet have reviewed a number of class size options which would rebalance the elementary class sizes to avoid the 20 to 26 jump, regain flex room spaces, and be more financially sustainable, while remaining below the new state targets for K-3, and further decreasing the average class size in the upper grades. This discussion has been a key element of the public workshops and community conversations over the course of this school year. The discussion model has Kindergarten beginning at 22 or 23 students. Given the current pattern of moderate growth as new families move into the district, school-wide average class sizes would stay under 24 from K-3rd grade and 4th and 5th grade would also be around 24 or 25.

Public Process and Community Outreach

The November 18, 2015 update to the Board reported on the public process at that time: a preliminary phone poll of 400 Berkeley voters conducted in September to assess knowledge and attitudes regarding the BSEP measure renewal, and a public workshop held on October 22, at which 180 participants were asked about BSEP programs, considered tax rates, class sizes, and suggested program priorities. The feedback from the poll and workshop was essentially very positive, with parents, staff and voters voicing support for continuing local funding for public schools. Attitudes toward class size changes and tax increases were mixed, with respondents to the poll and at the workshop seeing both possible advantages and concerns. Many parents and staff at the workshop voiced the wish to maintain current programs and add

funding for other student needs, while recognizing that there are limitations to the tax burden for even as supportive a community as Berkeley.

2016 Workshops and Community Conversations

The Superintendent and BSEP Director have made multiple presentations to community groups and hosted a series of workshops and “community conversations” across the district. The scheduled public events are listed in Appendix A. Additional outreach is continuing into April and early May to solicit further input.

The workshops and community conversations begin with a presentation on BSEP history and current programs, along with an examination of the educational and fiscal issues that are germane to the BSEP renewal. Participants are asked first to review multi-year budget scenarios for various elementary class size configurations and discuss the pros and cons of balanced elementary class sizes. Participants were also asked to discuss other current purposes of the BSEP measure, including libraries, music, student support programs, school discretionary funds, technology, etc., and facilitators recorded the input from these conversations using a live chat tool called “Today’s Meet”.

Each meeting has been summarized for each topic; a preliminary summary of the class size discussion from the first series of workshops and conversations follows in Appendix B, with the remaining workshops and topics to be summarized by the next board meeting. The community input has been thoughtful and wide-ranging. Overall, there appears to be an emerging consensus toward elementary class size balancing, although there are also concerns and suggestions to be addressed.

February Voter Poll

A more extensive voter poll was conducted in late February of 2016, reaching over 600 Berkeley voters, in order to obtain more detail on voter priorities for the BSEP measure. Highlights of that poll are in Appendix C, and include:

- A dramatic and positive improvement in the public opinion of the Berkeley Unified School District over the past five years.
- A high proportion of voters (71%) agree that the BSEP funding for the schools is worthwhile because it has resulted in better schools.
- When initially questioned about the measure, 70% of voters would definitely or probably vote yes.
- Support for the tax is consistent across most demographics, including household income, gender, party, white/non-white and homeowner status. There is higher support among those who are parents, students, renters, more recent homeowners, and people under age 55.

- The measure gained strength when people heard more details about how funds were to be used, even after voters heard about concerns such as class sizes or tax increases. A second question “after hearing more about the measure, would you support” saw growth from 70% definitely or probably voting yes initially to 73%, and from 75% yes including leans to 78% with leans after additional information.

RECOMMENDATION

Receive and discuss the BSEP Measure Planning Update.